

Creating An Effective Documentation Control System (DCS)

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ABSTRACT

Of necessity, every project must develop and implement a control system for the managing and monitoring of contract produced documents. Unfortunately, not every documentation control system is setup or utilized effectively. Setup is crucial to the success of the documentation control system. Structures, formats, and codes are some of the system components that need to be considered during the setup process. It is the “whats”, “hows” and “whys” that are discussed in this paper.

INFORMATION

Sharing information is essential to the successful performance of a project. The question to be asked at the outset is what information is crucial?

- What information needs to be captured?
- What information needs to be reported?
- What are the Contract and/or Client requirements?
- What are the Project requirements?

USERS

Projects are planned, designed, procured, managed, and built by teams. Hence the number of people providing and requiring project information can be substantial. Dependent on the team composition and responsibility assignments, a substantial number of people may require access to the DCS. The level of computer familiarity will vary widely and should be taken into consideration with the development of the DCS.

- What level of complexity should be developed?
 - Who is the user?
 - Who is the recipient?
- What training will be required?

HOW IT ALL WORKS

At its very basis, a DCS is a filing and retrieval system.

- The nature of the DCS
- Set-up and maintenance of the DCS
- Typical content / document types
 - Electronic documents (Word, Excel, Access, VISIO, PowerPoint, etc.)
 - Scanned documents (PDF, TIFF, etc.)
 - Compound documents
 - XML files
 - Images
 - Audio files
 - Video files
 - Forms
 - Emails
- Creating readable, useful reports

- Benefits of DCS
 - Increase efficiency by automating repetitive and time-consuming tasks
 - Standardize company's business processes across all projects
 - Reduce risk by tracking projects more effectively and consistently
 - Manage multiple projects in one database, allowing summary reporting and querying across all jobs
 - Track key performance indicators (KPI's) to monitor all levels of company profitability, efficiency and performance

SOFTWARE

Numerous industry-based off-the-shelf software applications are available to suit every need. Customization varies. Also, many companies have developed in-house software to meet their specific needs. Most documentation control software operates as a database for developing, storing and retrieving information. (similar to MS Access and/or MS Excel)

- Some software choices
 - Primavera Expedition
 - Meridian Prolog Manager
 - Documentum
 - File Maker Pro
 - FileNet Enterprise Content Management
 - 3D/T's ORBIT
 - WGI's SCORE
- Available software features
 - Version control
Tracking of major and minor document versions, essential for information accuracy with documents such as engineering drawings, contracts, and standard operating procedures.
 - Library services
Check in/check out capabilities that protect documents during editing and enforces user-specific versioning.
 - Workflow
Defines and automates business processes associated with creating and distributing documents, including the ability to facilitate collaboration with outside partners and suppliers.
 - Lifecycle management
Identifies, and enforces the stages a document must pass through such as reviewed, approved, published, archived, and retired.
 - Full-text searching
Navigate large sets of information without knowing how that information is organized or stored.
 - Renditions
Create renditions such as PDF and HTML for any channel or device.
 - Auto Notification
Automatic notification (and alerts) to allow for proactive management of critical items and issues requiring follow-up.
 - Presentation

Customize formatting and organization of information (layouts, field names, etc.).

SUMMARY

This paper provided an overview of a documentation control system. The “whats”, “hows” and “whys” were discussed. The establishment of a an efficient document control system is a benefit to the project.

REFERENCES

Primavera Website
Documentum Website
Meridian Prolog Manager Website
File Maker Pro Website
FileNet Enterprise Content Management Website
3D/I's ORBIT Website
WGI's SCORE
WGI's Corporate Document Control and Management Procedures